



Joint Policy Committee / Regional Planning Program

Date: February 1, 2004

To: Joint Policy Committee

From: Regional Planning Program Director

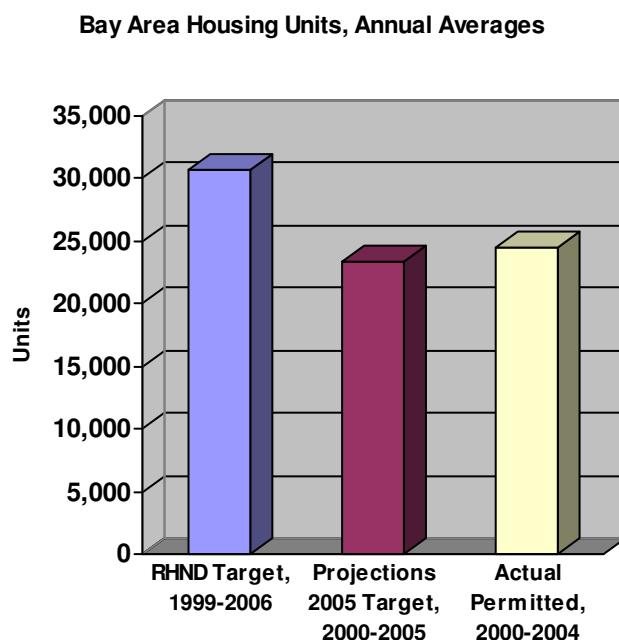
Subject: Housing Units Permitted 2000-2004 Compared to Regional Policy Targets

At the JPC meeting of Friday, January 28th, during the discussion of my report on multi-family housing development, a question arose as to how the housing units actually permitted over the period 2000-2004 compared to the region's housing policy targets. This memo addresses that question.

The region has two policy targets for housing: the first, the *Regional Housing Needs Determination* (RHND), is set by the State and allocated among jurisdictions by ABAG; the second follows from the Bay Area Smart Growth Vision as interpreted by ABAG's *Projections 2005*. Both policy targets are for total housing units (actually for households in the case of Projections 2005) and do not differentiate between single-family units and multi-family units. The two policy targets are for different time periods and cannot be directly compared to one another or to my housing permit data, which is for still a different period of time. However, the targets and permit data can be normalized in two ways to permit relevant comparisons, controlling for the difference in time periods. The first way is to convert the targets and data into annual averages. The second way is to present targets or data for each jurisdiction, not as absolute numbers, but as percentages of the regional total for each respective time period.

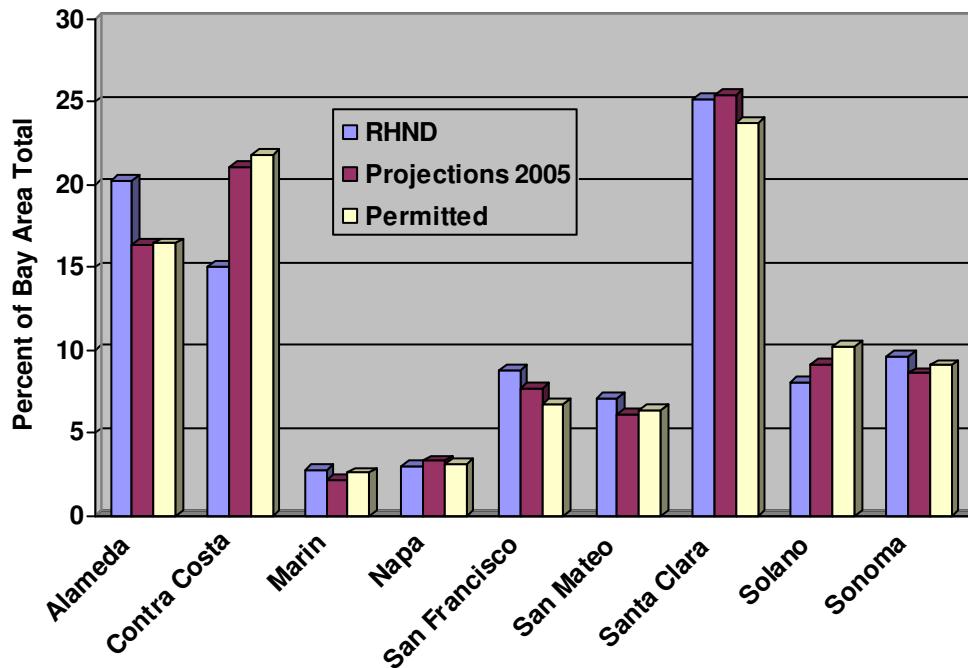
This chart compares the two annualized targets to the annualized permit data for the Bay Areas as a whole. As expected, units permitted fall considerably below that targeted by the Regional Housing Needs Determination process. However, permitted units slightly exceed the growth targets established for the period 2000-2005 by the Smart Growth Projections 2005. Projections 2005 do not call for substantial variations from the trend during the first ten years of forecast growth.

The chart on the next page provides comparisons of each county's percentage share of the regional total for the RHND, for the Projections 2005 household growth



forecast for 2000-2005, and for the housing units actually permitted from the beginning of 2000 through October 2004.

County Housing Units as Percent of Bay Area Total



Ironically, it appears that those counties that are making the most progress relative to their RHND targets are those where the majority of growth is occurring with single-family units (e.g., Contra Costa, Solano). While the data are not good enough to confirm this conclusion, I suspect that low-density development on greenfields continues to be the line of least resistance.

The attached table provides percentage share comparisons for cities within counties.

Housing Units Permitted, 2000-2004 Compared to Two Policy Targets

Jurisdiction	TARGET 1 Percent of Region's Total Housing Needs 2001-2006 ¹	TARGET 2 Percent of Region's Total Projected Household Growth, 2000-2005 ²	ACTUAL Percent of Region's Total Units Permitted, 2000-2004	
			Projected Household Growth, 2000-2005 ²	Percent of Region's Total Units Permitted, 2000-2004
Alameda County				
Alameda	0.94	0.77	0.21	
Albany	0.12	0.05	0.04	
Berkeley	0.55	0.34	0.51	
Dublin	2.36	3.17	3.32	
Emeryville	0.34	0.52	0.69	
Fremont	2.91	1.36	0.89	
Hayward	1.23	1.19	1.37	
Livermore	2.21	1.16	2.24	
Newark	0.54	0.34	0.21	
Oakland	3.35	3.03	3.36	
Piedmont	0.02	0.01	0.00	
Pleasanton	2.19	1.17	1.24	
San Leandro	0.38	0.60	0.54	
Union City	0.85	0.85	0.98	
Unincorp. Alameda County	2.30	1.84	0.84	
Alameda County Total	20.28	16.39	16.44	
Contra Costa County				
Antioch	1.93	3.41	3.10	
Brentwood	1.77	5.87	5.51	
Clayton	0.19	0.08	NA	
Concord	1.01	0.78	1.14	
Danville	0.48	0.51	0.26	
El Cerrito	0.08	0.04	0.03	
Hercules	0.34	0.85	1.37	
Lafayette	0.08	0.11	NA	
Martinez	0.58	0.27	0.24	
Moraga	0.09	0.02	-	
Oakley	0.52	0.74	0.86	
Orinda	0.10	0.03	NA	
Pinole	0.12	0.13	0.11	
Pittsburgh	1.09	1.36	1.80	

Housing Units Permitted, 2000-2004 Compared to Two Policy Targets

Jurisdiction	TARGET 1		TARGET 2		Percent of Region's Total Units Permitted, 2000-2004
	Percent of Region's Total Housing Needs 2001-2006 ¹	Projected Household Growth, 2000-2005 ²	Percent of Region's Total	Projected Household Growth, 2000-2005 ²	
Pleasant Hill	0.31	0.24	0.56	0.24	0.35
Richmond	1.13	0.56	1.47	0.56	1.47
San Pablo	0.21	0.21	0.34	0.21	0.34
San Ramon	1.93	2.51	0.32	2.51	0.32
Walnut Creek	0.72	0.54	0.36	0.54	0.36
Unincorp. Contra Costa County	2.36	2.81	6.27	2.81	6.27
Contra Costa County Total	15.04	21.07			
ACTUAL					
Marin County					
Belvedere	0.00	0.01	0.01	0.01	0.01
Corte Madera	0.08	0.13	0.01	0.13	0.01
Fairfax	0.03	0.01	0.01	0.01	0.01
Larkspur	0.13	0.02	0.03	0.02	0.03
Mill Valley	0.10	(0.02)	0.03	(0.02)	0.03
Novato	1.12	1.30	1.39	1.30	1.39
Ross	0.01	0.01	0.01	0.01	0.01
San Anselmo	0.06	0.03	0.04	0.03	0.04
San Rafael	0.91	0.28	0.53	0.28	0.53
Sausalito	0.09	0.03	0.04	0.03	0.04
Tiburon	0.07	0.03	0.12	0.03	0.12
Unincorp. Marin County	0.23	0.40	0.38	0.40	0.38
Marin County Total	2.82	2.22	2.60	2.22	2.60
Napa County					
American Canyon	0.57	0.02	0.03	0.02	0.03
Calistoga	0.07	1.52	1.09	1.46	1.09
Napa	1.46	0.04	0.04	0.06	0.04
St. Helena	0.06	0.02	0.02	0.04	0.02
Yountville	0.04	0.45	0.47	0.04	0.47
Unincorp. Napa County	0.85	3.32	3.11	3.06	3.32
Napa County Total	3.06	3.32	3.11	3.06	3.32
San Francisco					
San Francisco	8.83	7.69	6.71	8.83	7.69

Housing Units Permitted, 2000-2004 Compared to Two Policy Targets

Jurisdiction	TARGET 1 Percent of Region's Total Housing Needs 2001-2006 ¹	TARGET 2 Percent of Region's Total Projected Household Growth, 2000-2005 ²	ACTUAL Percent of Region's Total Units Permitted, 2000-2004	
			TARGET 2 Percent of Region's Total Projected Household Growth, 2000-2005 ²	Percent of Region's Total Units Permitted, 2000-2004
San Mateo County				
Atherton	0.07	0.03	0.09	0.09
Belmont	0.14	0.14	0.17	0.17
Brisbane	0.18	0.05	0.06	0.06
Burlingame	0.24	0.08	0.12	0.12
Colma	0.03	0.05	0.07	0.07
Daly City	0.60	0.30	0.28	0.28
East Palo Alto	0.56	0.69	0.75	0.75
Foster City	0.30	0.42	0.40	0.40
Half Moon Bay	0.20	0.26	0.25	0.25
Hillsborough	0.04	0.07	0.07	0.07
Menlo Park	0.43	0.05	0.11	0.11
Millbrae	0.15	0.13	0.15	0.15
Pacifica	0.29	0.12	0.10	0.10
Portola Valley	0.04	0.07	0.05	0.05
Redwood City	1.10	0.86	0.25	0.25
San Bruno	0.16	0.59	0.36	0.36
San Carlos	0.16	0.14	0.12	0.12
San Mateo	1.06	1.06	0.87	0.87
South San Francisco	0.58	0.26	0.80	0.80
Woodside	0.02	0.04	0.06	0.06
Unincorp. San Mateo County	0.73	0.70	1.26	1.26
San Mateo County Total	7.07	6.14	6.39	6.39
Santa Clara County				
Campbell	0.34	0.19	0.18	0.18
Cupertino	1.18	1.37	0.57	0.57
Gilroy	1.62	1.31	1.39	1.39
Los Altos	0.11	0.06	0.21	0.21
Los Altos Hills	0.04	0.15	0.14	0.14
Los Gatos	0.17	0.18	0.22	0.22
Milpitas	1.88	0.85	0.58	0.58
Monte Sereno	0.03	0.03	0.04	0.04

Housing Units Permitted, 2000-2004 Compared to Two Policy Targets

Jurisdiction	TARGET 1	TARGET 2	Percent of Region's Total Units Permitted, 2000-2004
	Percent of Region's Total Housing Needs 2001-2006¹	Projected Household Growth, 2000-2005²	
Morgan Hill	1.08	0.76	0.88
Mountain View	1.48	0.77	0.61
Palo Alto	0.61	0.88	0.45
San Jose	11.32	14.54	14.21
Santa Clara	2.75	2.56	2.37
Saratoga	0.23	0.25	0.34
Sunnyvale	1.66	0.48	0.84
Unincorp. Santa Clara County	0.63	1.01	0.67
Santa Clara County Total	25.13	25.38	23.71
Solano County			
Benicia	0.18	0.08	0.29
Dixon	0.63	0.12	0.50
Fairfield	1.65	2.83	3.70
Rio Vista	0.60	0.91	0.97
Suisun City	0.44	0.51	0.48
Vacaville	2.01	2.48	2.30
Vallejo	1.41	1.76	1.76
Unincorp. Solano County	1.18	0.46	0.20
Solano County Total	8.10	9.15	10.20
Sonoma County			
Cloverdale	0.18	0.51	0.48
Cotati	0.25	0.28	0.32
Healdsburg	0.25	0.40	0.20
Petaluma	0.50	0.84	0.85
Rohnert Park	0.92	0.26	0.56
Santa Rosa	3.32	3.60	3.96
Sebastopol	0.12	0.04	0.07
Sonoma	0.30	0.31	0.42
Windsor	0.90	0.86	0.86
Unincorp. Sonoma County	2.95	1.53	1.37
Sonoma County Total	9.67	8.63	9.09

Housing Units Permitted, 2000-2004 Compared to Two Policy Targets

	TARGET 1	TARGET 2	ACTUAL
Jurisdiction	Percent of Region's Total Housing Needs 2001-2006¹	Percent of Region's Total Projected Household Growth, 20000-2005²	Percent of Region's Total Units Permitted, 2000-2004 100.00
Bay Area Total	100.00	100.00	100.00

¹From Regional Housing Needs Determination for the San Francisco Bay Area, 2001-2006 Housing Element Cycle, ABAG, June 2001

²From Projections 2005, ABAG, December, 2004